

Professional Services



Your Agenda Guides Our Actions

Welcome to the Campaign Monitor Professional Services catalog! In the following pages you'll find our comprehensive range of training and design services. Each offering is tailored to empower you to unlock the full potential of your CM account and ensure success at every stage of your marketing journey.

Whether you're a new user seeking a customized account training or a seasoned marketer in need of a design revamp, we are here to be your trusted partner, dedicated to helping you achieve your objectives. We understand that every account is unique, which is why all of our services begin with a strategic touchpoint so we can craft a plan around what is most important to you.

We take pride in delivering solutions to your specific requirements. We are committed to your success and are dedicated to helping you achieve your marketing goals.



Looking forward to partnering with you,

Nate Gallagher
Director of Professional Services

Onboarding Packages

Let our team of experts help you get up and running in your new Campaign Monitor account as smoothly as possible.

Whether it's hands-on training and importing your contact data, sharing best practices regarding list growth, or designing a template design to work with the Campaign Monitor content editor, we've got you covered.



Essential Onboarding Package

A group of services designed to get you up and running in your account as efficiently as possible. We'll get your contacts imported and organized as well as train you on how to make best use of the new platform's feature set.

- Strategic kickoff call
- List Import (Limit up to 5 Excel/CSV lists and up to 10 custom contact fields)
- Custom Account Training

Template Onboarding Package

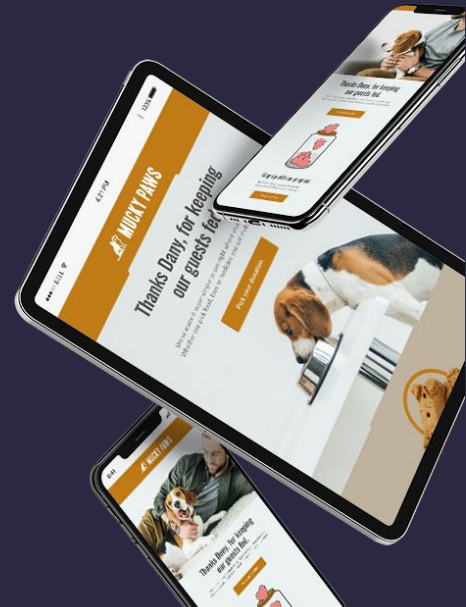
A group of services designed to get you up and running in your account as efficiently as possible. We'll get your contacts imported, train you on how to make best use of the platform's feature set, and get your template re-created for use with the CM drag and drop builder.

- Strategic kickoff call
- List Import (Limit up to 5 Excel/CSV lists and up to 10 custom contact fields)
- Custom Account Training
- Template Build (1 template)

Expert Hours

Having a point person who understands your email marketing goals, has a deep understanding of your account set up, and can act as an extension of your team makes the Expert Hours service one of our most popular offerings.

Whether you need help configuring your Emma account for the first time or would like a monthly standing monthly meeting, our email experts will coordinate with you to meet your needs. Their goal is to ensure you are using your account to the fullest while using best practices to boost engagement with your subscribers.



Below are examples of the types of work that can be accomplished with our most commonly-purchased numbers of monthly hours. Each successive tier includes the possible types of projects from the previous:

One-time bucket of Expert Hours

For when you need a helping hand with::

- Scalable onboarding assistance
- Automation creation and/or updates
- Audience clean-up and/or reorganization projects
- Re-engagement campaign strategy and implementation
- Custom reporting
- Custom dynamic content campaigns
- Hands-on training for new users

Recurring monthly Expert Hours

For when you want regular assistance with:

- Ongoing list maintenance and contact management
- Ongoing admin assistance i.e. setting user permissions, account updates
- A/B testing review and/or implementation assistance
- Segmentation + automation workflow strategy and/or implementation
- Email design + development consultations
- Manage preference and sign up form strategy and/or creation
- API and integration assistance

Details

Recurring Expert Hours include a recurring planning call and can be used for strategic recommendations, analytics review and hands-on help. All time spent toward service is tracked and hours do not roll over. Email specialist will let you know when your hours are running low.

Quick Start Training

Our team of Campaign Monitor experts is here to help you get started, whether you need help importing your first list of subscribers or setting up an automated journey. Quick Start trainings are designed to teach you how to get up and running by using some of the (or our) most popular and powerful features.



Lists and Subscribers

Work with an email expert who will work with you to help import and organize your subscriber list ahead of your first send. Ahead of the meeting we'll make sure to share with you some best practices around email subscriber data collection so we can hit the ground running.

Templates and Campaigns

If you're ready to dive into email design using our drag-and-drop editor, this training is for you! An email expert will walk you through the ins-and-outs of the CM email builder and help you feel confident in creating your first design.

Automation

From a quick welcome email journey to more complex segment-based sends, one of our email experts will walk you through the different automation options available in Campaign Monitor so you can take some manual sending off your plate!

Details

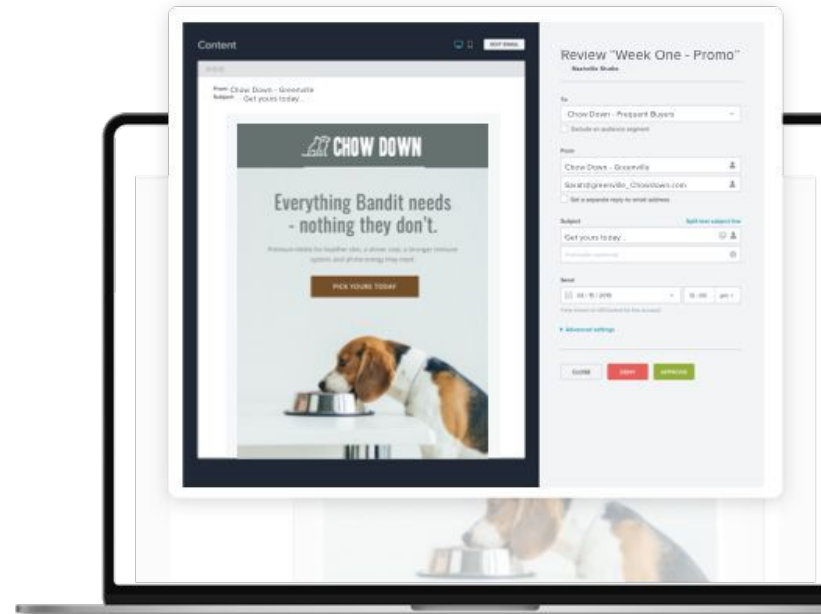
Quick Start Trainings Include:

- A strategic kickoff email, including articles about best practices to review ahead of the training.
- One 30-minute virtual training about a topic selected by the Customer. This meeting will be recorded.
- The recorded meeting link, as well as any resources discussed following the call.

Select Topic Training

A one-hour training session with an email specialist to review a single topic or a pair of topics in-depth.

Your specialist will walk you through the ins-and-outs of your selected topic(s) and provide tailored examples of how to best use these features to improve your email marketing efforts



Lists & Subscribers

Insights

Automation

A/B Testing

Campaigns

Suggested pairings:

Lists & Subscribers (single topic), Audience & Automation, Campaigns & Insights, Insights & A/B testing.

Details

Kickoff call (15 minutes)

Recorded screen-share training session (1 hour Zoom meeting)

Recording link and any supplementary training materials mentioned during the sessions

Custom Account Trainings

Two one-hour training sessions with an email specialist to review the features and functionality available within your account, tailored to your particular use cases and areas of interest.

Prior to the training, you'll meet with an email specialist to outline your organization's goals for the training.

Our specialists have extensive experience in training users of all levels across multiple industries, including: universities, franchise businesses, government and non-profit, health and fitness, and food and beverage.



Your specialist will walk you through adding and organizing your subscribers in a way that works best for your business. As well as:

- Segmenting your subscribers
- Creating a signup form
- Creating and sending an email
- Automating emails based on trigger events
- A/B content testing
- Reviewing your analytics

Details

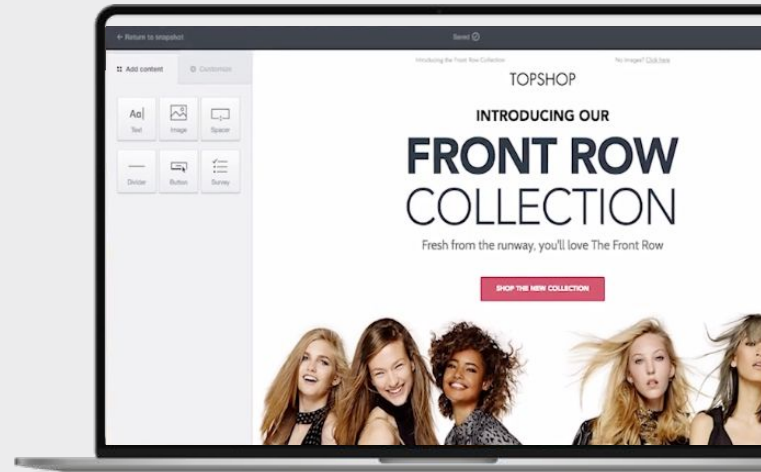
Kickoff call (15 minutes)

Two recorded screen-share training sessions (two 1-hour Zoom meetings)

Recording links and any supplementary training materials mentioned during the sessions

Design Services

Our team of expert email designers is here for you, whether you need us to create and develop a brand-consistent template, code a design of yours to work with the Campaign Monitor content editor, or review your emails to help improve the effectiveness of their design and accessibility.



Custom Template

Work with an email designer to create a ready-to-send mailing consistent with your brand's look and feel and incorporating your content. The designer crafting your template will lay out the content to focus on your calls to action and save the mailing for you to use as an example of best practices for effective email design in the future.

Details

- Design discovery call (20 minutes)**
- Image proof**
- Two (2) rounds of revisions**
- Email client render testing**
- Reusable template installation in either the drag and drop or HTML builder.**

HTML Coding

An email developer will code your submitted email design into a reusable, responsive template for use with either the drag and drop builder or HTML builder. If your content is included as part of your design, it will be recreated with the ability to edit.

Details

- Email client render testing**
- One (1) of round of revisions**
- Reusable template installation in either the drag and drop or HTML builder.**

Email Design Review

One of our expert email designer/developers will review up to five (5) of your existing email designs and detailing improvements we would recommend, covering visual hierarchy, content organization, calls to action, and accessibility.

Details

- Kickoff call (15 minutes)**
- Screen-share consultation (1 hour)**
- Screen-share recording**
- Next steps checklist**